Canadian Agriculture and Agri-Food

Exporter's Guide to Opportunities in the Middle East: YEMEN

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Exporter's Guide to Opportunities in the Middle East: YEMEN

OTHER AVAILABLE COUNTRIES IN THE STUDY

- United Arab Emirates
- Bahrain
- Saudi Arabia
- Kuwait
- Qatar
- Oman
- Jordan
- Lebanon
- Syria

Canadian Business Development International (CBDI) has been contracted by the Market Industry Services Branch of Agriculture and Agri-Food Canada to provide an overview of the export opportunities and general guidelines for Canadian exporters of agriculture and agri-food products in the following 10 countries in the Middle East:

1) Saudi Arabia	2) United Arab Emirates
3) Bahrain	4) Kuwait
5) Oman	6) Qatar
7) Jordan	8) Lebanon
9) Syria	10)Yemen

The studies of the other nine countries are available from Agriculture and Agri-Food Canada. All reports are available in English and French.

The study is a collection of the best available government and private sector information from Canada and abroad. It is designed to provide the reader with a fully compiled and referenced single source for all of this material as well as a detailed analysis of secondary import and export statistics provided by Statistics Canada and the World Trade Database.

The information contained in this document has been reviewed by trade and commodity experts at Agriculture and Agri-Food Canada, Department of Foreign Affairs and International Trade, and Canada's posts in the countries, and has met with their approval.

For a comprehensive list of the sources used by CBDI and a directory of contacts for further information please see the Bibliographical Index and Contact Information sections at the end of the report.

EXECUTIVE SUMMARY

INTRODUCTION:

The Agriculture and Agri-Food Exporter's Guide to Opportunities in the Middle East is designed to provide the reader with a single source reference manual on the key elements and opportunities for exporting to ten countries in the Middle East. It is intended for use by Canadian agri-food exporters. Trade Commissioners and other government officials will also find it a useful source document for information requests.

This study is in a modular format, such that each country profile can act as stand-alone documents, detailing the relevant information for potential Canadian exporters.

The statistical data included in this document has been provided by Statistics Canada (for Canadian exports) and the World Trade Database (for country imports). Due to the time and recording differentials inherent in the two databases, Canadian export statistics are provided in Canadian dollars, up to 1995; whereas country import statistics are only available in US dollars up to 1994. This standard is consistent throughout the document.

POTENTIAL OPPORTUNITIES:

The Middle East is generally an arid region with limited land available for agricultural production. Irrigation methods are used, however, countries (specifically Saudi Arabia) are finding it more difficult to drill for fresh and usable water, resulting in a further reduction of productive capabilities. As such, the region tends to import a large amount of agriculture and agri-food products to support consumption demands. These imports range from US$140 million (Qatar in 1994) to US$4.1 billion (Saudi Arabia in 1994). Thus it is clear that the Middle East offers immense potential for Canadian agri-food exporters.

Key opportunities include:

- **Processed Food and Products:** ***(HIGH)*** There are extensive opportunities for value-added products in all ten countries covered by this study, however, Saudi Arabia, the UAE, and Kuwait offer the best potential for growth.
- **Special Crops:** ***(HIGH)*** Canadian exports of special crops to the region have been increasing steadily over the past several years, with new opportunities emerging in chick peas and other pulses. Key markets are: the UAE, Saudi Arabia, Kuwait, and Syria.
- **Beverages:** ***(HIGH)*** Since most countries in the Middle East are predominantly Muslim, there is a high demand for non-alcoholic beverages. Canadian fruit and vegetable juices, carbonated flavoured water, and mineral water have the potential to do very well in the region. Bahrain, and the UAE in particular, offer a great deal of potential for alcoholic beverages as well.
- **Grains and Oilseeds:** ***(HIGH)*** Although Canadian exports of grains and oilseeds have tended to be either erratic or declining, there are significant opportunities for barley, wheat, canola oil and niche products in many countries, most notably Saudi Arabia and the UAE.
- **Eggs and Poultry:** ***(MEDIUM)*** There are promising opportunities for egg-type and broiler-type breeding chicks in Saudi Arabia, the UAE, Bahrain, and Yemen. As well, since pork is not consumed in most of the countries, poultry meat is generally a staple.
- **Livestock and Other Animal Products:** ***(MEDIUM)*** Despite rigorous import regulations, the Middle East is a large import market for live animals and meat products. Strong potential exists in the UAE, Saudi Arabia, Jordan, and Syria.

GENERAL CONSTRAINTS:

Many North American's perceive the Middle East to be too complicated a market to enter, despite the significant opportunities that await determined exporters. Although there are very real constraints to dealing with the Middle East, they are easily overcome with the right approach. Some of the more notable difficulties include:

- **Transportation Costs:** Due to the long distances, there are considerable costs involved in exporting goods to the Middle East. Furthermore, containerization is often a problem. Since Canada does not import enough products that require refrigerated or ventilated containers, exporters often find it costly to bring these specialized containers up from the US.
    - *Although these are real constraints, Canadian exporters may consider consolidating shipments to the Middle East to reduce costs and avoid partially empty containers from increasing shipping costs.*

- **Language and Cultural Barriers:** Unlike exporting to the US or Europe, the Middle East is a dramatically different environment in which to operate. There are very specific ways to conduct business which may seem foreign to many Canadian exporters.
    - *These barriers are easily overcome with frequent visits to the region. Also important is the selection of a good agent who can bridge the gap in culture and language for the exporter*

- **Strict Regulations:** The Middle East has a number of regulations that make exporting to the region complex and cumbersome. Most notably are the strict halal requirements for animal products and bilingual (and other) labelling requirements and production and expiry dates for all goods.
    - *The Canadian embassies in the region can help exporters understand and comply with these regulations, as well as assist in the selection of a good agent who will also help. This document also explains a number of the requirements for exporting to the region.*

It should also be noted that Canadian producers have an inherent advantage in meeting the labelling demands of the region, since they are already accustomed to printing bilingual labels for domestic use.

MARKETING TIPS:

Below are some suggestions for marketing Canadian products to the Middle East:

- If possible, visit the region. Face-to-face contact can be the difference between marketing success and failure. Bring product samples (where applicable) and be prepared to discuss price.
- Consider participating in major food shows in the area; for example, the Gulf Food Show in Dubai, UAE, is an excellent way to meet potential customers from throughout the region and beyond.
- Eye-catching designs, logos, and colours that identify the product as Canadian may boost sales.
- Be ready to assist with shipping. If necessary, be ready to recommend a shipping company or directly arrange shipment and provide shipping costs.
- Be prepared to discuss marketing and advertising strategies. Gulf importers, in particular, are increasingly looking for advertising advice and assistance, especially with new-to-market products.
- Be aware that many importers will request exclusive agency agreements with suppliers. In many cases, local laws make it difficult to terminate an agency agreement, even with due cause. Thus selecting a good agent is particularly important.

REGIONAL INFORMATION

MARKETING:

The Middle East is a dynamic and diverse region with differences in the way business is conducted both within and between the various countries. However, there are some general rules for marketing products in the region.

- Face to face contact can significantly increase the chances of establishing successful business relations.
- Maintaining that relationship through frequent communications is equally important for success.
- The countries in the region are mostly cash markets, with substantial revenues from oil resources.
- Many of the countries have young populations, implying higher disposable income and expected growth in the future.
- The Gulf countries in particular have highly advanced agriculture and agri-food markets that tend to be very price competitive.
- The region has a strong knowledge and growing desire for Western products.

Key points to stress when selling products are:

- competitive price;
- Canadian origin; and
- the high-quality of the products.

Considerable emphasis should be placed on the role of these countries as possible markets for re-export of Canadian products. The port of Dubai in the United Arab Emirates (UAE) in particular, is a major re-export market, serving markets in other Gulf countries, Pakistan, Iran, and countries of the former Soviet Union (FSU). The Dubai World Trade Centre reported that Dubai imports approximately 70% of the UAE's consumable items, worth US$1.9 billion per year. Around 70% of these imports are then re-exported. Approximately 20% of these re-exported goods go to Iran, which is Dubai's largest re-export market. Dubai's re-exports to FSU countries were US$405 million in 1995, 27% of which was comprised of agricultural and agri-food products (not including equipment and chemical fertilizers). Azerbaijan is the leading market in the FSU for these re-exported goods.

Each country has specific, and often complex marketing regulations, such as labelling requirements and best before dates, that potential Canadian exporters should examine carefully before bringing their products to the region. For example, in Bahrain, baby food has an 18 month expiry period compared with a 12 month period in the UAE or Saudi Arabia. This example serves to highlight the importance of verifying each country's regulations before any sales are made. The Trade Annex that accompanies each country profile provides the details of many of these regulations.

It is strongly recommended by Migra's Canadian Exporters Guide (1995) that the term "**Persian Gulf**" should not be used on goods, documents, or letters for some destinations in this region. Anything so marked might be confiscated and destroyed by the Arab authorities. The term "**Arabian Gulf**" should be used.

PRICING:

Generally, it is recognized that shipping adds considerably to the cost of items manufactured in Canada, which can face stiff competition from Far Eastern and European suppliers. Thus pricing of products, particularly processed or semi-processed foods and beverages is particularly important. Many of the countries in the region are very price competitive markets, however, high Canadian quality goes a long way.

Moreover, exporters should consider the option of consolidating shipments of various products in order to reduce the burden of transportation costs, thereby making products more price competitive when they reach the markets.

Some of the countries in the region have strict policies with respect to pricing, while others have general norms that are followed by most exporters. Pricing policies are listed in the Annexes for each country.

RESTRICTED IMPORTS:
All imported beef and poultry products require a health certificate from the country of origin and a halal slaughter certificate issued by an approved Islamic centre in the country of origin ("halal" slaughter refers to animal slaughter performed according to Islamic law).

TRADE ARRANGEMENTS:
Gulf Cooperation Council (GCC):
The Gulf Cooperation Council (GCC) consists of six member countries (Saudi Arabia, the United Arab Emirates, Kuwait, Bahrain, Qatar, and Oman). The GCC controls half of the proven oil reserves outside the former Soviet Union, and accounts for about 40% of all the oil moving in international trade. Created in 1981, the GCC tried to maintain the balance of power in the Gulf by strengthening multilateral cooperation in security and economic matters. The presidency of the GCC rotates yearly among the rulers of the member countries. The GCC is headquartered in Riyadh, Saudi Arabia.

As far as trade is concerned, the GCC is a loose confederation which serves only as a policy-coordinating forum for its members. It cannot impose trade policies upon its member states, thus each is free to pass and enforce its own trade laws.

In recent years there has been growing cooperation among GCC members on certain issues, such as:
- establishing standards;
- setting tariff ranges; and
- intellectual property protection.

There is also consideration being given to forming a customs union. Renewed work on a free trade area between the GCC and the EU is also pushing the six member states to closer coordination.

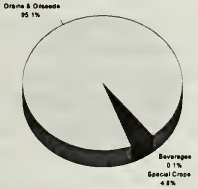
Arab Cooperation Council (ACC):
Jordan, Yemen, Egypt, and Iraq signed an agreement in February 1989, joining the countries in a new Arab economic bloc called the Arab Cooperation Council (ACC). The new community was designed to create a common market and encourage investment in joint projects. The goals of the association are to achieve economic integration in all production centres and coordinate the many areas including the economy, residence, travel, finance, industry, agriculture, transport, and communications.

Arab League Boycott of Israel
In 1994, the Arab League boycott of Israel was partially lifted. The original boycott was initiated in 1959 and stated that all products coming directly from Israel, through Israel, or containing inputs from Israel were banned from all Arab League countries. Moreover, trade with countries that also traded with Israel was restricted. The 1994 partial alleviation of the ban left only the primary ban on Israeli products intact.

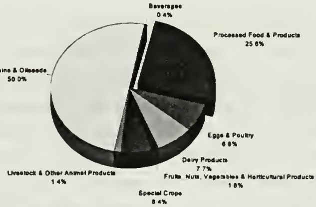
YEMEN

Official Name	Republic of Yemen
Head of State	President Ali Abullah Saleh
Minister of Agriculture	Ahmed Salem Al-Jabali
Language	Arabic (Official)
Population (1995)	14.7 million
Currency	Yemen Rial (YR)
Real GDP Growth (1995)	-1%
Gross Domestic Product (1995 Per Capita)	$1,955
Consumer Price Inflation (1995)	75%
External Debt (1995)	$8.9 billion
Principle Growth Sectors	Liquified Natural Gas, Tourism, Light Industry
Total Country Exports (1995)	$2 billion
Total Country Imports (1995)	$1.9 billion
Agri-Food Imports from the World (1994)	US$585.9 million
Agri-Food Imports from Canada (1995)	CDN$16 million

Canada's Agricultural Exports to Yemen 1995



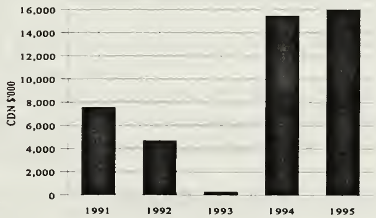
Yemen's Agricultural Imports 1994



CANADA'S AGRICULTURAL EXPORTS TO YEMEN

StatsCan : IN CDN $'000	1991	1992	1993	1994	1995
Grains & Oilseeds	6,979	2,739	0	14,729	15,219
Livestock & Animal Products	0	0	0	0	0
Special Crops	202	1,874	163	637	764
Fruits, Nuts, & Vegetables	0	0	0	0	0
Dairy Products	0	0	0	0	0
Eggs & Poultry	0	0	0	0	0
Processed Food and Products	384	78	114	94	0
Beverages	0	0	0	0	12
TOTAL EXPORTS	7,565	4,691	277	15,460	15,995

Canada's Agricultural Exports to Yemen
1991 - 1995

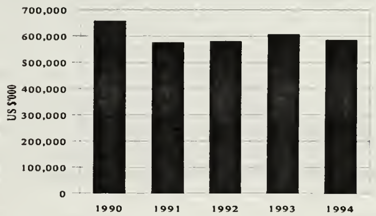


* Import and export totals may not match the sum of the commodities due to grouping and rounding procedures.

YEMEN'S TOTAL AGRICULTURAL IMPORTS

WTDB : IN US $'000	1990	1991	1992	1993	1994
Grains & Oilseeds	352,158	251,839	290,384	277,962	293,169
Livestock & Animal Products	16,334	16,508	15,046	14,901	8,194
Special Crops	40,945	40,821	34,799	36,099	37,268
Fruits, Nuts, & Vegetables	7,240	4,660	12,225	9,170	9,456
Dairy Products	75,960	57,974	47,694	67,903	45,118
Eggs & Poultry	23,213	28,683	31,267	48,158	40,103
Processed Food and Products	139,396	172,190	144,219	150,872	150,050
Beverages	3,037	3,031	5,409	2,935	2,556
TOTAL IMPORTS	**658,283**	**575,706**	**581,043**	**608,000**	**585,914**

Yemen's Agricultural Imports From the World
1990 - 1995



YEMEN

BACKGROUND INFORMATION

Political Economy:

North and South Yemen agreed to form a united country in May 1990. This soon came under stress as the South attempted to secede in the spring of 1994. A civil war ensued in which the North won, keeping the country together, but damaging the economy greatly. However, even without the civil war, or Yemen's support of Iraq in the gulf war, the economy would still be relatively poor and underdeveloped. Yemen is currently one of the world's poorest countries, despite its oil revenues. These factors have kept growth down to 3.5% a year since 1989. Floods in July, 1996 have damaged the economy further, destroying infrastructure and washing away fertile soil, especially in the south. Once self-sufficient in food, Yemen now imports essential food commodities.

Agriculture in Yemen:

The agricultural sector has not kept pace with population growth. The country's geography provides only limited land suitable for mechanized agriculture, and much of the arid mountainous terrain has suffered serious erosion over a long period. Some land once used for the production of cotton, fruit and vegetables to meet domestic and export demand has been shifted to the production of qat, a mildly narcotic shrub chewed by Yemenis. Yemen has become a significant importer of wheat, wheat flour, rice, and corn due to population rising faster than food production. Agriculture employs over 55% of the Yemeni labour force and contributes to an estimated 30% of the GDP. Agriculture is dependent on rainfall as less than one quarter of arable land is irrigated, although an estimated two thirds of the pumped water is lost due to inefficient irrigation. An estimated two thirds of agricultural holdings are two hectares or less mostly on terraced mountain slopes.

- potential export opportunity for technical expertise.

Currently, Yemen produces grains, fruits, vegetables, coffee, cotton, dairy products, poultry, meat, and fish. While grain dominates local production, Yemen still has to import grain to meet domestic demand. Yemen also boasts a wealth of unexploited fishing resources.

Agricultural Trade in Yemen:

With a need to increase agricultural production and improve erosion control, farming equipment is needed.

Total agricultural imports for 1995 are estimated at around US$700 million and are likely to rise further subject to the country's financial ability. This, in sharp contrast to Yemeni food imports from 1990 to 1994, which have suffered fluctuations, and an ultimate decline of US$70 million to rest at US$585 million in 1994. However, since political stability has been essentially restored, and considering the floods of 1996, continued growth in food demand is expected to keep imports strong. Key areas of growth may include wheat, wheat flour, rice, and niche markets in processed food and products. The modest poultry industry, which depends on imported corn and protein meals for feed, may offer growth potential as well.

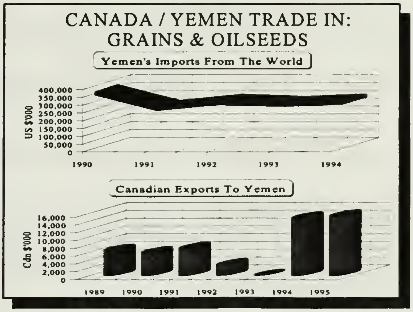
EXISTING OPPORTUNITIES:

GRAINS AND OILSEEDS

Market Characteristics:

Yemeni imports of grains and oilseeds declined from US$352 million in 1990 to US$293 million in 1994, although indications are that 1995/96 figures are increasing, perhaps signifying something of a turnaround.

- ♦ This decrease is mostly due to a large decline in Yemen's imports of non-durum wheat, which fell from US$190 million in 1990 to US$87.6 million in 1994. Rice imports also fell US$18 million over this period to rest at US$31 million in 1994.
- ♦ Imports of meal and flour, on the other hand, doubled from US$58 million in 1990 to US$117 million in 1994.
- ♦ Soybean oil imports also increased from US$380,000 in 1990 to over US$1.4 million in 1994.



The Yemeni government's intention to reduce or eliminate the subsidies on wheat and wheat flour may cut future consumption considerably. Due to a variety of factors, accurate information on the current size of the Yemeni market, and the quantity of exports and imports, is not available.

Export Opportunities:

Canadian exports of grains and oilseeds to Yemen are exclusively in the form of wheat sales. Canadian exports of wheat jumped to over $15 million in 1994 and 1995, from $5.8 million in 1990.

- ♦ Canadian exports of hard spring flour fell from their 1989 high of $6.3 million to $0 since 1993.

Constraints & Competitors:

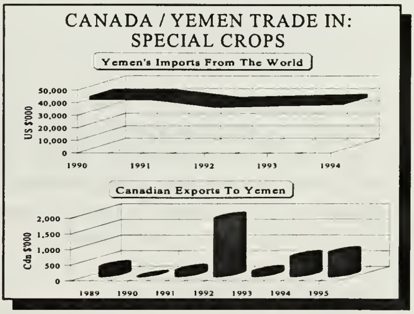
Principal competitors in this market include Thailand, the US, and the EU.

SPECIAL CROPS

Market Characteristics:

Yemen imported US$40 million worth of special crops in 1990 and this number has since fallen slightly to US$37 million in 1994.

- ♦ The decrease comes primarily from the tobacco (not stripped) which fell from US$7 million in 1990 to US$2 million in 1994.
- ♦ Pulses have also fallen by US$2 million to US$2.4 million in 1994.



Export Opportunities:

Canadian exports of special crops has decreased over the past several years. In 1992 Canada exported almost $1.9

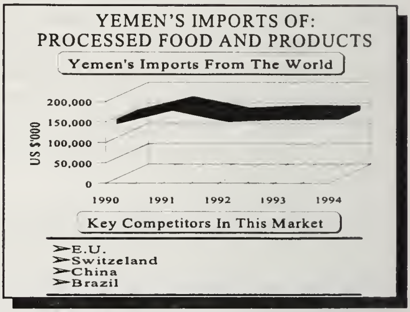
million in special crops to Yemen. However, by 1995 this figure had dropped to $764,000.

- The decline is due to a significant fall in tobacco exports, from $1.5 million in 1992 to $321,000 in 1995.
- Exports of pulses increased slightly to almost $450,000 in 1995, from $396,000 in 1992.

Constraints & Competitors:
Principal competitors in this market include China (pulses), and China, India, and the EU (tobacco products).

NEW AND EMERGING OPPORTUNITIES:

PROCESSED FOOD AND PRODUCTS



Market Dynamics:
Total Yemeni imports of processed food and products has increased slightly from US$139 million in 1990 to US$150 million in 1994.

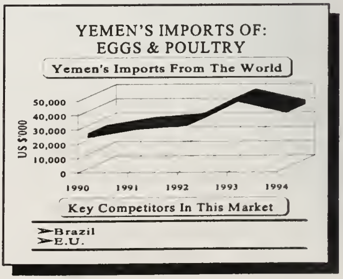
Market potential for processed foods is limited, but may afford useful niche outlets for various food items. Two areas that have been highlighted are:

- <u>*Canned Fruits and Vegetables:*</u> The urbanization of Yemen's growing population, now at about 16 million, is creating a larger demand for canned food products. Also, the Yemeni Government has made significant progress recently in reducing barriers and opening up the market. Thus, while the market remains small, Canadian exporters can expect to find a growing opportunity for selected processed fruit and vegetable products.

- <u>*Honey:*</u> Honey is a traditional food product in Yemen, and a significant amount is imported to supplement local output. Good quality Canadian honey can be shipped to Yemen at competitive prices, offering potential for developing the market through additional effort.

Constraints & Competitors:
Principal competitors in this market include the EU, Switzerland, China, and Brazil.

EGGS & POULTRY



Market Dynamics:
Yemen's egg and poultry market has seen significant growth since 1990 when imports were US$23 million. In 1994, imports of eggs and poultry had increased steadily to reach US$40 million, entirely on the strength of imports of poultry meat which grew by more than US$20 million over this period.

Constraints & Competitors:
Principal competitors in this market are Brazil and the EU.

ANNEX A: MARKETING INFORMATION

Background Information:
Yemen is open for business. Conditions in Yemen are changing rapidly, mostly for the better. A populous country strategically located at the southern tip of the Arabian Peninsula, Yemen is pursuing the transition to democracy and a free market economy. The political and security problems which led to the 1994 civil war have lessened and the Yemeni government is committed to improving the business climate. A series of economic reforms announced in late March 1995 should have a positive impact in the medium to long term. Additional reform measures are expected.

Distribution System:
Despite moves to improve, the market distribution system is still poorly developed, with limited storage and transportation facilities (especially for foods requiring refrigeration or special handling). There is little price information for suppliers; inadequate and expensive transportation; insufficient and often inappropriate storage; and rudimentary packaging.

Pricing:
The government sets prices for subsidized commodities (wheat and flour) plus gasoline, electricity, telephones, and water. However, there are almost constant efforts to pressure merchants to control price increases of other basic goods. Imported goods are usually priced in dollars, with the rial price varying according to the daily market exchange rate.

ANNEX B: TRADE REGULATIONS

Import Licensing:

Imports require a license issued by both the Ministry of Supply and Trade and the Ministry of Industry. Licenses are sent directly to banks to open a letter of credit. In addition, the importation of certain products requires the permission of certain government agencies. Only Yemeni nationals are able to obtain import licenses. As well, insurance for all imports must be purchased locally. Imports from Israel are prohibited.

In recent months the list of 64 prohibited items has been dramatically reduced. Prohibited items now include all types of fresh fruits and vegetables, (with specific mention of grapes and raisins, almonds and pistachios, coffee and husks, kebzera (a local herb), hot peppers, millet, barley, and fenugreek), all types of salt; and pork.

Credit and Payment Conditions:

- *Usual Terms:* Cover for most Western insurers unlikely to be resumed until the medium-term. Confirmed, irrevocable letters of credit are recommended.

- *Transfer Situation:* Foreign exchange delays of 6 month are reported. There are often major bureaucratic delays due to the government's multiple exchange rate system.

Customs Tariff:

Yemen uses a single column tariff based on the Customs Co-operation Council Nomenclature. Customs duties are applied on the CIF value of the import.

Import of foodstuffs face customs duties that range from 5 to 30%. Although, live animals, fertilizers, and agricultural equipment enter duty-free.

Almost all trade barriers affect Yemeni businesses as much as they affect foreign businesses. Customs procedures are widely considered the most significant barrier to trade and add to the cost of everything from shipping to distribution.

Labelling Requirements:

The country of origin must be shown on all goods; the marking must be in Arabic on imported milk and baby products.

It is unclear what the remaining labelling requirements are for exporting foodstuffs to Yemen, however, exporters are advised to contact Canadian Embassy personnel to verify the explicit regulations.

ANNEX C: LOGISTICS

Infrastructure in Yemen:

Major commercial centres are accessible by road or air. There are excellent roads connecting Yemen's major cities (Sanaa-Hodeidah, and Hajjah- Sanaa-Taiz-Aden). Roads in the rest of Yemen are poorly maintained. The telephone system is good, but acquiring a phone line can be slow and mobile phones have been inoperable since early 1994.

Entry and Warehousing:

Goods at the port of Hudaydah generally have to be cleared within six months. Goods left uncleared linger than six months from the date of discharge from vessels are subject to confiscation.

Key Ports of Entry:

Yemen's main ports are *Hudaydah, Aden,* and *Mocha (or Al Mukka)*.

Free Trade Zones:

Yemen has declared Aden a free trade zone.

Importer/Agency Agreements:

While not required by law, it is strongly recommended that foreign firms work with a reliable and experienced Yemen partner.

BIBLIOGRAPHICAL INDEX - YEMEN

BACKGROUND INFORMATION:

Department of Foreign Affairs & International Trade
- "Doing Business in the Middle East" (September, 1996)

Agriculture and Agri-Food Canada
- "Agri-Food Overview of the Gulf States" (1996)

United States Department of Agriculture - Foreign Agricultural Service (USDA/FAS)
- Attache Reports
- Food Market Report

These information products provide a comprehensive review of the country's agricultural production characteristics, trade policies, and market issues. They are a valuable tool for any exporter in assessing the opportunities for agricultural exports to a given country or region. These reports (and others) can be accessed electronically via the internet at: ***http://ffas.usda.gov/ffas/markres.html.***

United States National Trade Databank
- International Trade Administration - "Country Commercial Guide"

The "Country Commercial Guides" offer the reader a broad analysis of the political/economic make-up of a country as well as a review of the economic trends and outlook for a number of industrial sectors.

EXPORT OPPORTUNITIES:

United States Department of Agriculture - Foreign Agricultural Service (USDA/FAS):
- Attache Reports

Statistics Canada
- Canadian Export Statistics (1988 - 1995)

World Trade Database
- Yemen's Import Statistics from the World (1990 - 1994)

ANNEXES:

Arab World Online (AWO)

One of the most used sites for this study, Arab World Online is an information source with direct access to virtually every aspect of the Arab world. AWO is a joint-venture between the National U.S.-Arab Chamber of Commerce (NUSACC) and Multitasking Online. This site provides general overviews on all the countries in the Study, as well as detailed marketing, trade, and logistics information. Notably, the **Halal Requirements** section of Annex B is taken directly from this site. It can be accessed via the Internet at: ***http://www.awo.net***.

Arab Net

Arab Net is a web site that compiles a great deal of the relevant country and regional information available on the internet into one, easy to use, site. It can be accessed at: ***http://www.arab.net***.

Dun & Bradstreet Exporter's Encyclopaedia (1995)

This is the single most often cited information product used in the Annexes. It provides a detailed guide to trade and logistical information for all of the countries in the study, as well as a variety of other useful information for exporters interested in the region.

Migra's Canadian Exporter's Guide.

One of the few private sector Canadian sources available, this guide offers some very detailed documentation requirements for the countries in the region.

CONTACT INFORMATION -YEMEN

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